

MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

2012 Michigan Hotel Data

Occupancy: 56.8%, up 3% over 2011

Average Daily Rate (ADR): \$83.44, up 3.9%

Revenue Per Available Room (RevPAR): \$47.42, up 7.1%

All three measures are at highest levels since 2004

Source: Smith Travel Research

2011 Final Data



PURE MICHIGAN™
Your trip begins in michigan.org



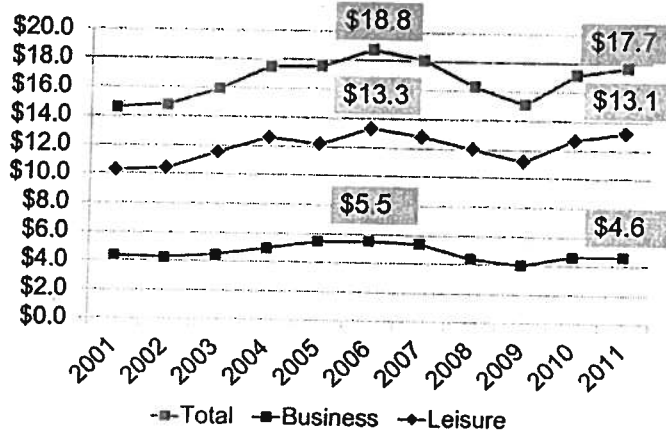
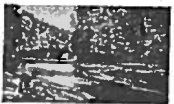
- Total Visitor Spending: \$17.7 billion, up \$500 million
- State Taxes Paid: \$995 million
- Business Travel: \$4.6 billion, up .4%
- Resident Leisure Travel: \$6.3 billion, up .8%
- Out-of-state Leisure Travel: \$6.8 billion, up 7.5%
- Jobs Supported: 200,000

Source: D.K. Shifflet & Associates

Visitor Spending History (in billions)



PURE MICHIGAN™
Your trip begins in michigan.org

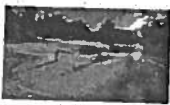


Source: D.K. Shifflet & Associates

Pure Michigan Results History



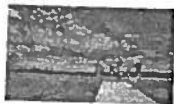
PURE MICHIGAN®
Your trip begins at michigan.org



Year	Trips	Spend
2006	698,000	\$188m
2007	1.26m	\$287m
2008	1.14m	\$270m
2009	2.11m	\$624m
2010	2.04m	\$606m
2011	3.20m	\$997m

Source: Longwoods International

Pure Michigan Results 2012



PURE MICHIGAN®
Your trip begins at michigan.org

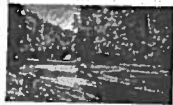
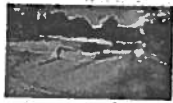


- \$13.7 million in out-of-state spring/summer advertising
- Motivated 3.8 million trips to Michigan
 - 2.3 million from the region (IL, IN, OH, WI, MO, Ontario)
 - 1.5 million from outside the region
- Those visitors spent \$1.1 billion at Michigan businesses
- Those visitors paid \$79 million in Michigan sales tax
- The state made \$5.76 for each dollar spent on Pure Michigan spring/summer advertising in 2012

Source: Longwoods International



PURE MICHIGAN®
Your trip begins at michigan.org



Pure Michigan Results 2006 - 2012

- Generated 14.2 million out-of-state trips to Michigan
- Those visitors spent \$4.1 billion at Michigan businesses
- And they paid \$287 million in Michigan taxes on those trips, primarily sales tax

Source: Longwoods International

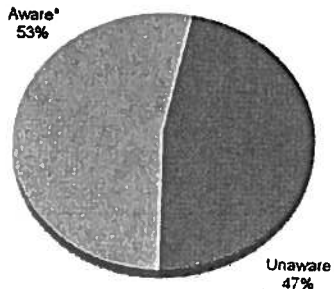


PURE MICHIGAN®
Your trip begins at michigan.org



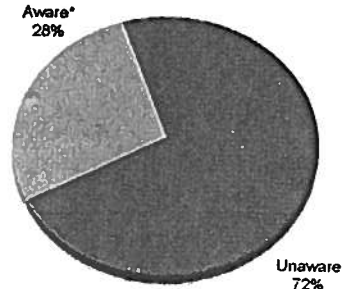
Awareness of 2010 Pure Michigan Campaign

Regional Market

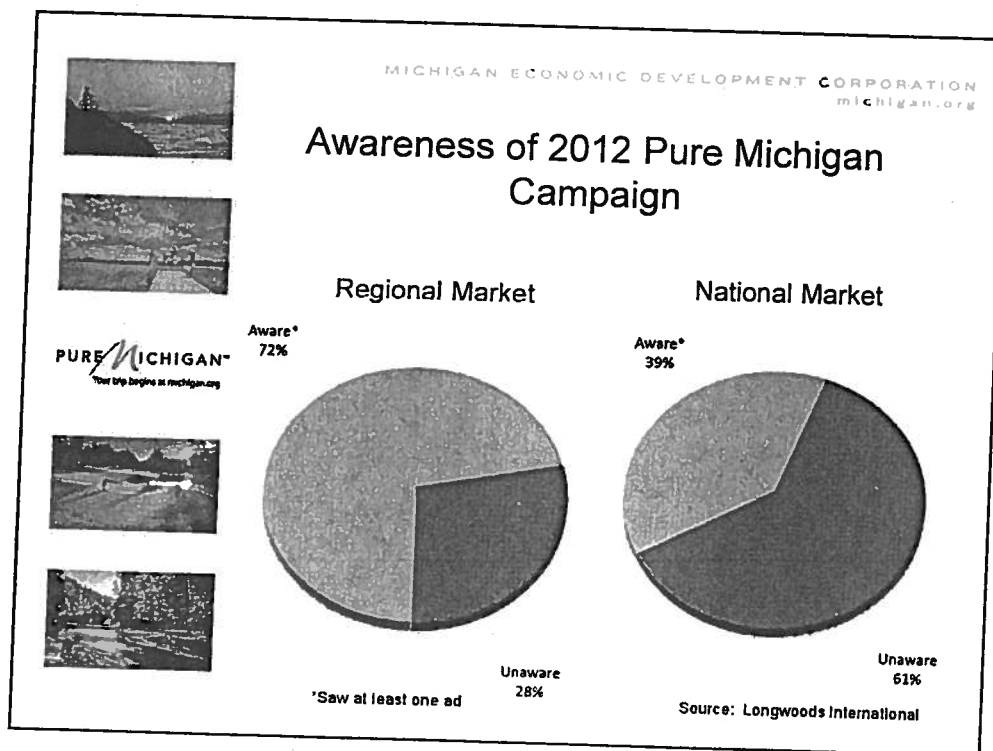
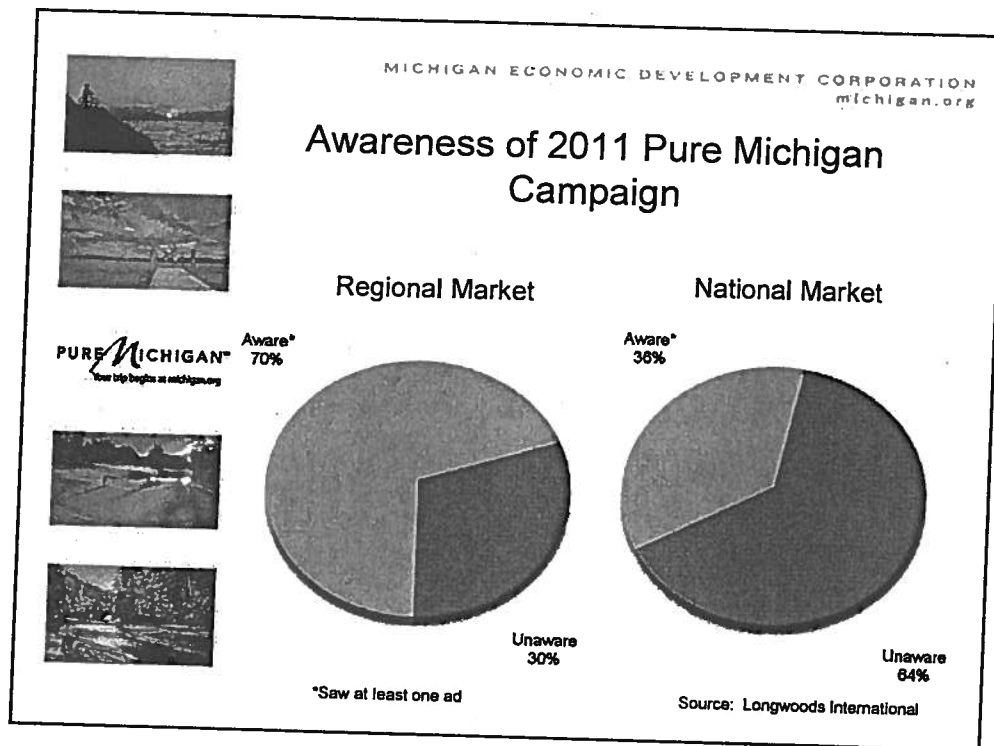


*Saw at least one ad

National Market



Source: Longwoods International



Chicago Business Journal March 28, 2013

Mar 28, 2013, 1:38pm CDT

"Pure Michigan" ad campaign ready to mesmerize Chicago once again

PURE MICHIGAN™
Your trip begins at michigan.org



Lewis Lazare
Reporter-
Chicago Business Journal
Email | Twitter

There's no stopping the "Pure Michigan" steamroller.

What is easily one of the nation's most beautifully-crafted and successful tourism ad campaigns has just begun another national push primarily via cable television. And on May 6, "Pure Michigan's" new regional summer advertising campaign



Nashville (TN) Business Journal February 13, 2013

Feb 13, 2013, 2:09pm CST | UPDATED: Feb 22, 2013, 9:55am CST

Michigan: Tennessee's tourism marketing inspiration

PURE MICHIGAN™
Your trip begins at michigan.org



Jamie McGee
Staff Writer-
Nashville Business Journal
Email | Twitter | Google+

For the "gold standard" of tourism marketing, look to Michigan, says Susan Whitaker, commissioner of the Tennessee Department of Tourist Development.

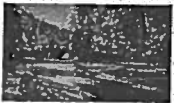
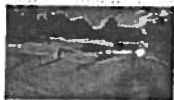
The "Pure Michigan" campaign has been funneling millions of additional out-of-state visitors to Michigan destinations, spreading awareness of the state through TV, radio.



Five Mercury Awards in 2012



PURE MICHIGAN™
Your trip begins at michigan.org



- Best TV Ads
- Best Radio Ads
- Best PR
- Best Social Media
- Best Partnership Program

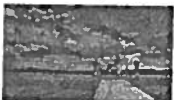


There were 12 categories, no other state won more than one

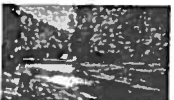
Pure Michigan 2013 Budget

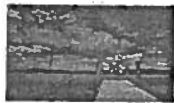
This \$25 million funds:

- \$1.7 million regional winter buy Dec/Jan
- \$13 million national cable spring/summer buy (\$3 million from partners)
- \$4.3 million for regional spring/summer buy
- \$2.2 million for regional fall buy
- All other marketing (PR, publications, social media, web site, etc.)

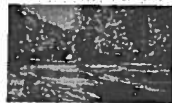
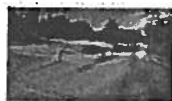


PURE MICHIGAN™
Your trip begins at michigan.org





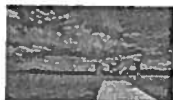
PURE MICHIGAN™
Your trip begins at michigan.org



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

2013 National Cable Buy

- \$13 million national cable TV buy, biggest ever (including \$500,000 each from Grand Rapids, Mackinac Island, The Henry Ford, Traverse City, and \$1 million from Ann Arbor)
- 5000 airings of Pure Michigan TV commercials nationally March 18 through June



PURE MICHIGAN™
Your trip begins at michigan.org



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

2013 National Cable Buy



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

New TV "Gone Fishing"

PURE MICHIGAN™
Your trip begins at michigan.org

MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

2013 Print Ad

PURE MICHIGAN™
Your trip begins at michigan.org

Michigan State
It was not until I was 10 years old

My father would take me to the lake and we'd

Remember the breeze on the water was so light

Other times, we'd go to the lake and it was perfect again

And even though we usually had our share of fish

Remember it was never for the fish that we were

Looking for the best of times simply put it was

And let me say a thousand times over that was Pure Michigan

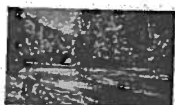
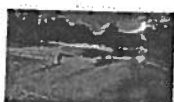
PURE MICHIGAN™
Your trip begins at michigan.org

MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

2013 Billboards



PURE MICHIGAN
Your trip begins at michigan.org



Your trip begins at michigan.org

Miners Beach Falls

PURE MICHIGAN

Your trip begins at michigan.org

Grand Sable Dunes

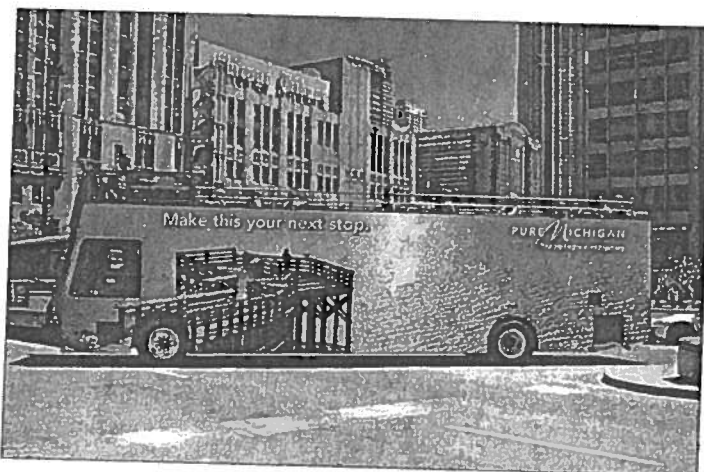
PURE MICHIGAN


MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

2013 Chicago Bus Wrap



PURE MICHIGAN
Your trip begins at michigan.org






PURE MICHIGAN™
Your trip begins at michigan.org

MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org


Hunting/Fishing on Outdoorhub.com



The screenshot shows the OutdoorHub website with the 'PURE MICHIGAN' logo. It features several article teasers with images and text:

- Magnificent May Fishing: Thabawassee River Walleye** - Bob O'Leary - Four years out of the pond but, I've spent the last 30 minutes in April on the Thabawassee River with my buddy Greg O'Leary. This April was no exception. More »
- Golden Domes, Fish, and Fun on the Detroit River** - Dave Hall - When the Detroit River opens the first of its annual fishing season, anglers flock to the river. More »
- Chicken Feeders for Cripples on Michigan's Charlevoix Lake** - Bob O'Leary - Perhaps you're going to do as planned and head to the river for the first time. More »
- Michigan's Rouge River** - Bob O'Leary - Perhaps the most beautiful "wild" river in Michigan is the Rouge River. More »
- Downriver Trips for Michigan's King Salmon All Day** - Dave Hall - Many visitors to Michigan's Great Lakes area go with the intent of catching a few during their trip. More »

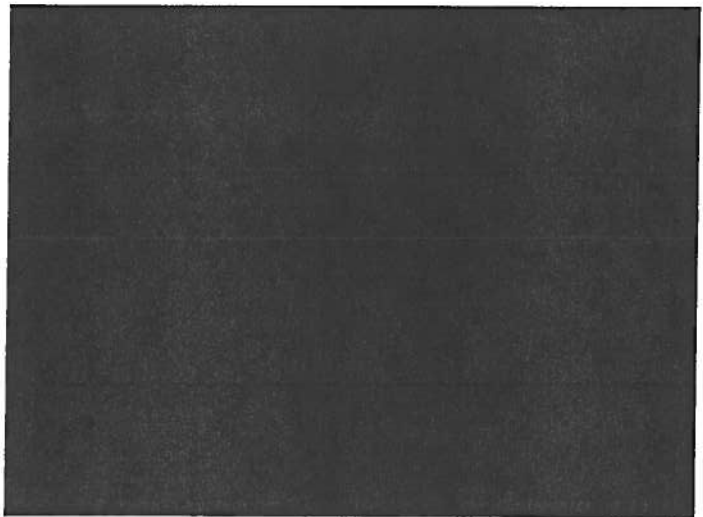
Below the articles is a 'Videos' section with a video player showing a fishing scene.



PURE MICHIGAN™
Your trip begins at michigan.org

MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Kevin VanDam Fishing Promo



2013 Advertising Partners

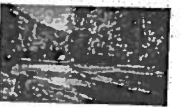
\$5.5 million from 42 partners
Up from \$3.9 million in 2012,
\$3.1 million in 2011

Five national partners: Ann Arbor,
Grand Rapids, Mackinac Island,
The Henry Ford, Traverse City
Up from 4 in 2012, 3 in 2011

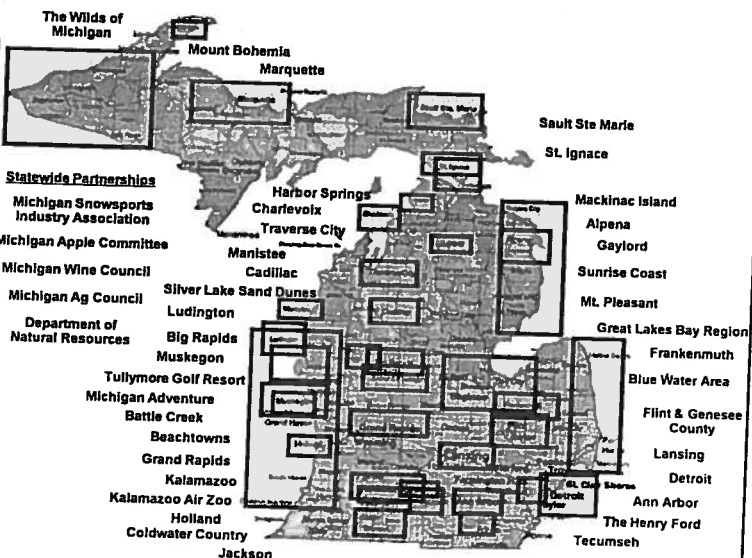
Program started in 2002, with 2 partners,
\$235,000 in private-sector investment



PURE MICHIGAN™
Your trip begins at michigan.org

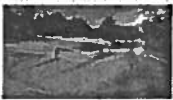


PURE MICHIGAN™
Your trip begins at michigan.org





PURE MICHIGAN™
Your trip begins at michigan.org



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Pure Michigan Budget vs. Other States (2012)

1. Hawaii -- \$75 million
2. California -- \$61 million
3. Illinois -- \$55 million
4. Florida -- \$38 million
5. Texas -- \$36 million
6. Michigan -- \$25 million

Avg. state tourism budget \$14.5 million

Source: U.S. Travel Association



PURE MICHIGAN™
Your trip begins at michigan.org



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

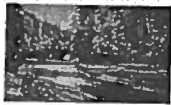
Top Ten U.S. Advertisers 2012

- | | |
|-----------------------|---------------|
| 1. P&G | \$2.8 billion |
| 2. Comcast | \$1.7 billion |
| 3. GM | \$1.6 billion |
| 4. AT&T | \$1.6 billion |
| 5. L'Oreal | \$1.5 billion |
| 6. Verizon | \$1.4 billion |
| 7. News Corp | \$1.3 billion |
| 8. Toyota | \$1.2 billion |
| 9. Berkshire Hathaway | \$1.2 billion |
| 10. Chrysler | \$1.1 billion |

Source: Kantar Media

FY' 14 Budget Proposal

Governor Snyder
proposes increasing
Pure Michigan
promotion budget
from \$25 million to
\$29 million to boost international
marketing.



International Marketing

International travel is booming worldwide
Up 4% in 2012 to 1.035 billion trips,
U.S. inbound travel up 6.2% in 2012

Overseas visitors spend \$4300 per trip, stay
17 nights on U.S. trips

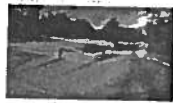
Need to invest to capture market share

Sources: World Tourism Organization, U.S. Dept. of Commerce, U.S. Travel
Association





PURE MICHIGAN™
Your trip begins at michigan.org



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Top Ten International Markets to U.S. 2012 (through Oct. 2012)

1. Canada	19.5 million, up 6%
2. Mexico	11.5 million, up 6%
3. U.K.	3.2 million, down 2%
4. Japan	3.1 million, up 14%
5. Germany	1.6 million, up 3%
6. Brazil	1.4 million, up 17%
7. China	1.3 million, up 37%
8. France	1.3 million, down 3%
9. South Korea	1 million, up 8%
10. Australia	900,000, up 8%

Source: U.S. Dept. of Commerce



PURE MICHIGAN™
Your trip begins at michigan.org



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Canadian Visitation to Michigan

	MI Rank	Visitors (millions)	Spending (millions)
2011	4	1.54	\$441
2010	5	1.40	\$336
2009	4	1.29	\$295
2008	4	1.42	\$301
2007	4	1.41	\$305
2006	4	1.32	\$273
2005	4	1.24	\$208
2004	4	1.14	\$166

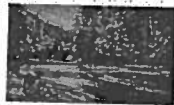
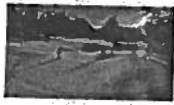
Source: U.S. Dept. of Commerce

International Marketing

Current Program



PURE MICHIGAN™
Your trip begins at michigan.org



- Advertising in Southern Ontario
 - \$600,000 annual budget
 - London, Kitchener, Hamilton, but not Toronto
- Promotion in the UK and Germany
 - \$200,000 annual budget
 - In partnership with Great Lakes USA (OH, IL, MN, WI)

International Marketing

FY '14 with \$4 million funding increase

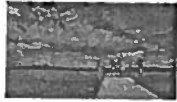


PURE MICHIGAN™
Your trip begins at michigan.org



- Expand Ontario advertising to include Toronto
- Expand promotion in the UK and Germany
 - Continue partnership with Great Lakes USA
- Enter new markets in Asia, i.e. Japan, South Korea and China
 - Partner with Brand USA

Chicago vs. Toronto



PURE MICHIGAN™
Your trip begins at michigan.org



- Population
3.5 million 3.8 million
- Distance to Michigan border
70 miles 180 miles
- Household income above \$100k
26% 33%

Chicago vs. Toronto



PURE MICHIGAN™
Your trip begins at michigan.org



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Great Lakes USA




PURE MICHIGAN™
Your trip begins at michigan.org




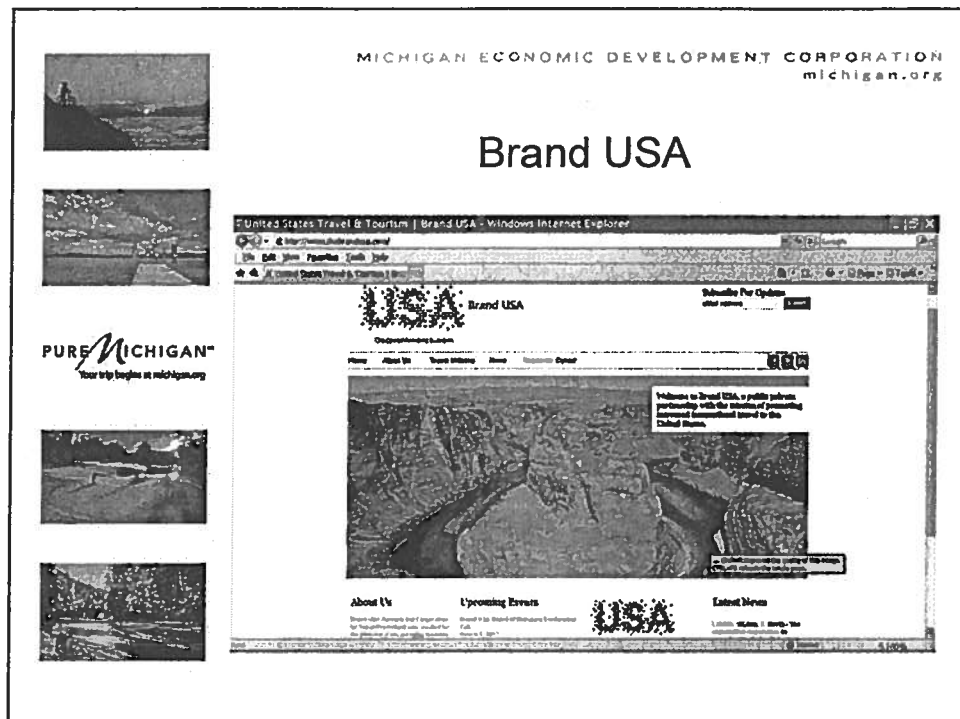
MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Great Lakes USA



PURE MICHIGAN™
Your trip begins at michigan.org





MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Brand USA



PURE MICHIGAN
Your trip begins at michigan.org

- 2013 Markets
 - Canada, UK, Germany, Japan, China, Brazil, India, Mexico, Australia
- Advertising, PR, discoveramerica.com, reps in market, promotions, trade activity
- Adding 30% to our Canadian media buys
- Advertising in their World Guide
- Exploring other opportunities

International Marketing Opportunities

- ITB, Berlin, March
- Great Lakes USA UK sales mission, April
- Brand USA International Pow Wow, Las Vegas, June
- 2014 Pow Wow in Chicago
- Great Lakes USA German sales mission, October
- World Travel Market, London, November

PURE MICHIGAN™
Your trip begins at michigan.org

New michigan.org

PURE MICHIGAN™
Your trip begins at michigan.org





PURE MICHIGAN™
Your trip begins at michigan.org

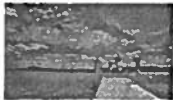


MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

michigan.org

Most popular state tourism web site in U.S.
in 2012, sixth year in a row

1. michigan.org	7.1% market share
2. Florida	6.19%
3. Virginia	5.96%
4. Arkansas	5.58%
5. Hawaii	4.37%
6. North Carolina	3.96%
7. Texas	3.74%
8. Minnesota	3.12%
9. Utah	2.81%
10. Oklahoma	2.74%



PURE MICHIGAN™
Your trip begins at michigan.org



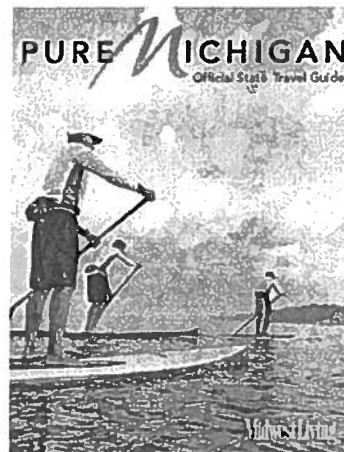
MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org


Michigan Travel Ideas

1,000,000 printed

650,000 polybagged
with March/April
Midwest Living

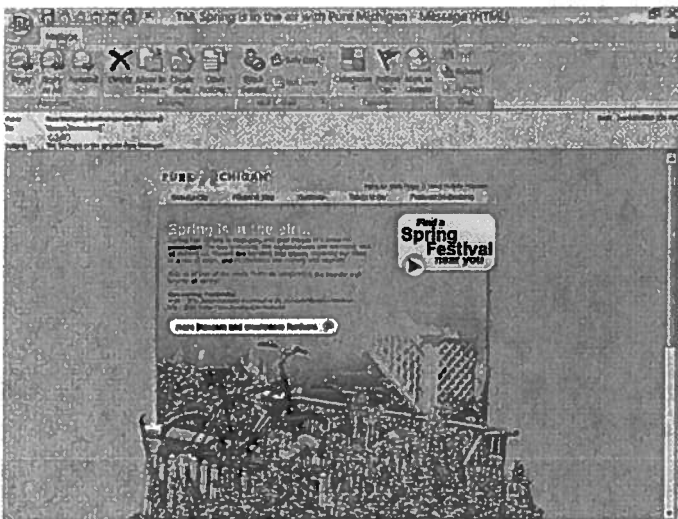
New Fall, Winter
Guides





MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Consumer enewsletter



PURE MICHIGAN™
Your trip begins at michigan.org



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Pure Michigan & Social Media









PURE MICHIGAN™
Your trip begins at michigan.org



Pure Michigan 400






Michael Finney






PURE MICHIGAN™
Your trip begins at michigan.org



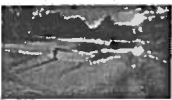




2013 MI Pace Car Sweepstakes



PURE MICHIGAN™
Your trip begins at michigan.org




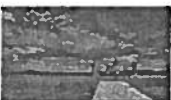
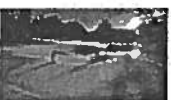
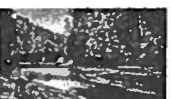



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Pure Michigan & Detroit Tigers







MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Pure Michigan & Detroit Tigers





MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Pure Michigan & Detroit Grand Prix




PURE MICHIGAN™
Your trip begins at michigan.org




MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Pure Michigan & Coca Cola




Coca-Cola Refresh yourself.
PURE MICHIGAN

PURE MICHIGAN™
Your trip begins at michigan.org




MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Pure Michigan & Coca Cola




PURE MICHIGAN
Your trip begins at michigan.org



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org


Pure Michigan & Kroger



PURE MICHIGAN
Your trip begins at michigan.org

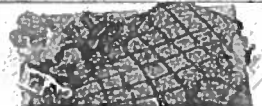
PURE MICHIGAN[®] MILK.

Enjoy a cold glass of fresh Kroger brand milk, with 100% Michigan[®] milk.



Nourishing and refreshing, ice-cold milk always hits the spot.

PURE MICHIGAN
MILK



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Pure Michigan & Kroger




PURE MICHIGAN™
Your trip begins at michigan.org




MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

Pure Michigan & Hudsonville




PURE MICHIGAN™
Your trip begins at michigan.org



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

New Standard License Plate



PURE MICHIGAN™
Your trip begins at michigan.org

MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

The Vision of Pure Michigan

"Michigan is one of America's favorite four-season travel experiences"*

*Michigan Tourism Strategic Plan, 2012-2017

Achieving this vision will mean:

- Millions of new visitors to the state
- Billions more spent at Michigan businesses
- Tens of thousands of new jobs statewide
- Tens of millions in new state tax collections

PURE MICHIGAN™
Your trip begins at michigan.org



PURE MICHIGAN™
Your trip begins at michigan.org



MICHIGAN ECONOMIC DEVELOPMENT CORPORATION
michigan.org

George Zimmermann
Vice President for Travel Michigan
Michigan Economic Development
Corporation
zimmermannng@michigan.org